Guide 1: PDR System – Creating a full review
Technical User Guide
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**General Principles**

The process is broken down into three main stages:

- **Stage 1 – Appraiser (Line Manager/Supervisor) PDR Activation Action**

- **Stage 2 – Appraisee (Individual receiving a PDR) Action**

- **Stage 3 – Appraiser (Line Manager/Supervisor) PDR Completion Action**

Within each stage there are a number of steps to follow which have been clearly listed.

The system is secure and password controlled and can only be viewed by the either the Appraiser or the Appraisee at any one time, dependent on what stage the PDR is at. (I.e. the Appraiser cannot add to the forms until the Appraisee has completed their stage). Once stage 2 is complete, the Appraisee cannot alter their comments.
Stage 1 – Appraiser (Line Manager/Supervisor) PDR Activation Action

Step 1: To access the PDR application: insert the following URL into your browser*:

http://vitec.force.com/Vitec/

(Suggestion: add to “Your favourites” on your internet browser)

*ALL USERS ACCESSING THE SITE VIA AN INTERNET EXPLORER BROWSER MUST ENABLE COMPATIBILITY WITH THE PDR SITE PRIOR TO USING THE SITE. THIS NEED ONLY BE DONE ONCE, YOU DO NOT NEED TO DO EACH TIME YOU ACCESS THE SITE. FAILURE TO DO THIS WILL RESULT IN A LOSS OF DATA. THE PROCESS TO ENABLE COMPATIBILITY IS:

1) Navigate to the Tools menu in Explorer browser:

2) Click on Compatibility View Settings whilst on the PDR site webpage http://vitec.force.com/Vitec/ and click Add to add force.com
3) Compatibility is then enabled and you can click Close.

Step 2: The following log on screen will appear:

If this is your first time using the on-line system you should click on the “Forgotten your password? Click here” link, as circled in the screen shot above. You will be required to enter your valid e-mail address (in most cases this will be your work e-mail address firstname.surname@vitecgroup.com). Your password will be e-mailed to you from the platform on which the site is based (SalesForce).

If you have used the system previously the password you set will remain, however if you have forgotten your password/wish to change it, you should click on the “Forgotten your password?” link.

Step 3: Within the welcome screen a list of the employees you are appraising is shown:
To trigger the start of a Performance Review you must click on the “New PDR” icon within the row of the appraisee (see above).

**Step 4:** After clicking on “New PDR” the following screen appears (see overleaf), the default “Completed By” date is set to 2 weeks from the Start Date. Click on “Create”.

On clicking “Create” an automated email is sent to the appraisee and invites them to start the review process.

If you navigate back to the welcome screen you will then see the status has reverted to “Locked” which means that you have now transferred the process over to the appraisee (Stage 2). See locked view below.

***This ends Stage 1 – Appraiser (Line Manager/Supervisor) PDR Activation Action***
Stage 2 – Appraisee (Individual receiving a PDR) Action

**Step 1:** You will receive an automated email (addressed from pdr@vitecgroup.com) inviting you to start your review by clicking on the link contained within the e-mail ([http://vitec.force.com/Vitec/](http://vitec.force.com/Vitec/)).

**IMPORTANT:** If using Internet Explorer to access the site please refer to Stage 1 (step 1) for details on how to enable compatibility. Failure to do this may result in data loss.

The log in screen below is presented, you enter your Company e-mail address and password (if this is your first time using the system/you have forgotten your password, you should click on "Forgotten your Password click here" link and follow the on screen instructions to create a password). This will then be e-mailed to you from the site on which the platform is based (SalesForce).

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**Step 2:** The PDR welcome screen appears (as below) and you can begin to complete your review by clicking on “Start/Continue”. 
Step 3: The PDR review screens are presented and are systematically worked through from top to bottom by clicking on the sections in turn (please ensure that you save your progress periodically by clicking Save at the top right hand corner of the screen).

If you are unable to add your input in one sitting you have the option to save your progress so far and return at a later date, which can be done by clicking on (at the bottom of the screen) which will return you to the welcome screen where you can log out.
Step 4: Reviewing your Contribution
You complete this section by inputting free text within the boxes. The answers to these questions and any comments will be discussed within the review meeting between you and your Manager.

Step 5: The Vitec Mindset
This section is for information purposes only.

Step 6: Core Values (Customer Focus, Integrity, Collaboration, Creative Solutions, Product Excellence)
Click on the + sign to expand each section in turn. Each Core Value has its own section to which you rate yourself by selecting the appropriate rating number from the dropdown list (the key to each rating number can be found in the “Rating Key” document contained within the icon). Comments to justify your selection should be added to the text box.

Below is an example of the Customer Focus section:
Step 7: Objectives Review
[Note: If this is the first time you have done an “on line” review, you will not have any objectives for review listed and therefore can skip this section].

If you have had an on-line PDR before you will be able to see your objectives, you should make your own assessment on how you performed against the objectives by selecting the appropriate selection from the “Objective Achieved” drop down field and add any comments (insert your initials before any comments that you make).

Please note that there is an overflow field for each task “comments” that can be used if you are not able to accommodate all the task text in the Task field (the task field is limited to 80 characters).

Step 8: Objective Setting
[Note: Each objective should be set a current year due date, if they are assigned dates outside of the current year they will not be displayed in the “Add/Amend objectives” area of the system that is utilised during the year. The same applies if no date is set. Therefore when setting objectives you must assign a current year due date, this can be altered at a later date via the Add/Amend objectives area – if unsure of completion dates at this point please just insert the end of year date e.g. 31/12/2014].

You are expected to enter objectives that you are aware of or would like to propose which can then be used as the basis for discussions during your PDR meeting. Your manager also has input to this section once you have submitted your PDR to them.

[Note: When adding additional objectives/tasks you must scroll down the window in order to input them all, if the calendar pick list is not showing you can type the date in].
Step 9: Career Development & Training Recommendations

You should enter any suggested training requirements; these will be discussed and agreed (where appropriate) during your PDR meeting.

Step 10: Comments

You should add any additional comments within the Comments section.

Step 11: Submit to Manager

Before submitting you should save your input and generate a PDF of your PDR for your reference by clicking on Generate PDF, at which point you will receive a copy of your PDR via e-mail.

When you have checked your input you need to submit your review to your manager by clicking on the Submit to Manager button. Please be aware that once you have submitted to your manager, you will be unable to make additions or amendments. Therefore, one final check of the details you have added is advised.

*** This ends Stage 2 – Appraisee (Individual receiving a PDR) Action ***
Stage 3 – Appraiser (Line Manager/Supervisor) PDR Completion Action

Step 1: Manager – email notification that Appraisee has completed their self-review
You will receive an e-mail notification on behalf of each appraisee with a short message saying “I have completed my review”.

Step 2: Manager – input into PDR
Log into the site as outlined in Stage 1 (steps 1 & 2). You will see on the Welcome screen that the Status will have changed for those employees who have submitted their review to you. It will read “Start/Continue”. For those that are still being worked on it will show the status as “Locked”.

For those that have submitted their review you are now ready to complete their PDR by clicking on the “Start/Continue” button.

Once you have entered the review area, you have access to view appraisees comments via the “Reviewing Your Contribution” section. Once read, you are now ready to provide your own assessment of the employee against the core values.

Step 3: Core Values (Customer Focus, Integrity, Collaboration, Creative Solutions, Product Excellence)
You should make your assessment of the appraisee against each Core Value. You rate the employee by selecting the appropriate rating number from the dropdown list (the key to each rating number can be found in the “Rating Key” document contained within the icon). Comments to justify your selection should be added to the text box.

Example below:

Step 3: Objective Review
You should evaluate the appraisees comments and their selection within the “Objective Achieved?” dropdown box. If you wish to add to the objectives comments box please add your initials before your input. Should there be any discrepancy between the appraisees assessment and yours this can be discussed during the meeting.
Please note that there is an overflow field for each task “comments” that can be used if you are not able to accommodate all the task text in the Task field (the task field is limited to 80 characters).

[Image: Objectives Review]

[Note: you will need to scroll down the window in order to see all objectives/tasks].

**Step 4: Objective Setting**

[Note: Each objective should be set a current year due date, if they are assigned dates outside of the current year they will not be displayed in the “Add/Amend objectives” area of the system that is utilised during the year. The same applies if no date is set. Therefore when setting objectives you must assign a current year due date, this can be altered at a later date via the Add/Amend objectives area – if unsure of completion dates at this point please just insert the end of year date e.g. 31/12/2014].

Objectives can have numerous associated tasks with due dates. Each main Objective should have a percentage figure next to it to demonstrate the proportion of the employee’s time and focus that will need to be spent achieving that Objective over the forthcoming year. It would be expected that all employees typically have at least 6 main Objectives within a PDR.

[Image: Objective Setting]

[Note: When adding additional objectives/tasks you will need to scroll down the window in order to see them all].
**Step 5: Career Development & Training Recommendations**

This section should be used to discuss and agree potential training and development needs. Complete these boxes (as shown overleaf) by selecting options from the dropdown lists and adding notes/further information as required.

![Career Development and Training Recommendations](image)

**Step 6: Rating Summaries**

******** THESE FIELDS ARE MANDATORY*******

![Rating Summaries](image)

This section MUST be completed.

This is a freehand section of the system and will not be completed automatically.

The aim of this section is for you to rate the Appraisee on their whole performance throughout the review period. The section requires you to provide a “Core Value Overall Rating” from the dropdown list and an “Overall Objectives Achieved %” (which has a box to input the total percentage value achieved over the review period).

You should also make an assessment on the “Trend from last year’s performance” by selecting the appropriate option from the dropdown list (Improving/Stable/Declining).

To complete, simply select a rating from the dropdown list for the Core Values Rating Summary, and enter an overall percentage completion value in the % of Overall Objectives Achieved.
Step 7: Additional Comments
This section is for any additional comments you need to make about the performance of the Appraisee as a whole.

Step 8: PDF Generation
Finally, select the button, which will email you a PDF of the PDR so far. It is advisable to save a copy of the PDF to your local disc. [Note: Occasionally messages with PDF attachments will route to your Outlook Junk email folder, so it is advisable to check in here if nothing appears in your Inbox.]

Step 9: PDR to appraisee prior to meeting
The PDR is now ready to be handed or emailed to the Appraisee prior to the PDR meeting. This will provide them with sufficient time to review your comments before the review meeting.

Step 10: ***PDR Meeting***

Step 11: Sign off by Manager - Following the PDR meeting you can re-enter the online appraisal and add any additional comments. This can include any comments that the appraisee wishes to have entered into the system as they are unable to do this via their own log-in.

Once completed, click and the following message will appear, you should select “OK” if you are happy to proceed. Please note that after this point, NO FURTHER CHANGES CAN BE MADE TO THE PDR.
An emailed PDF of the Review will automatically be sent to both Manager and Appraisee.

***This ends Stage 3 – Appraiser (Line Manager/Supervisor) PDR Completion Action and completes the PDR process***